

Town of Damariscotta, Maine



Proposal for Property Revaluation Services

KRT Appraisal

Town of Damariscotta, Maine



Proposal for Property Revaluation Services

KRT Appraisal

191 Merrimack St, Suite 701
Haverhill, MA 01830
Tel: (877) 337-5574
Fax: (978) 914-7201

February 3, 2025

TABLE OF CONTENTS

A:	Price Proposal
B:	Letter of Transmittal
C:	Why Hire KRT Appraisal?
D:	Statement of Services
E:	Company Profile
F:	Qualifications/References/Letters of Recommendation
G:	Resumes
H:	AP5 Specs
I:	RFP

February 3, 2025

Andrew Dorr
Town Manager
21 School Street
Damariscotta, ME 04543

Price Proposal

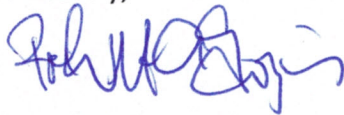
Dear Mr. Dorr:

KRT Appraisal (KRT) is pleased to submit a proposal for Property Revaluation Services (Full Revaluation). KRT will provide all services requested in the RFP, while conforming to all Maine State Laws.

Based on the estimated real estate parcel count (1,840), personal property accounts (300) and scope of services contained in this proposal, the total cost for a 2028 Full Revaluation of all Real and Personal Property is **Two Hundred Thirty Thousand Dollars (\$230,000)**. KRT requests the Town convert CAMA to AssessPro5 (AP5) by Patriot Properties. This bid shall be voided if the Town chooses not to convert to AP5. This price includes the AP5 CAMA and data conversion. This price includes ten (10) days for defense of value. If requested, the additional cost beyond the included ten (10) days for defense of values at any Board or local/state body is **One Hundred Fifty Dollars per Hour (\$150.00/Hour)**.

I look forward to the opportunity to discuss this proposal with you. If you have any questions or need more information, please do not hesitate to call.

Sincerely,



Robert Tozier
Vice President
KRT Appraisal
Office: (877) 337-5574
Fax: (978) 914-7201
rob_tozier@krtappraisal.com
www.krtappraisal.com

February 3, 2025

Andrew Dorr
Town Manager
21 School Street
Damariscotta, ME 04543

Letter of Transmittal

Dear Mr. Dorr:

The following report is submitted in response to your Request for Proposals (RFP), for the Town of Damariscotta, Maine. This proposal will remain in effect for at least ninety (90) days from the submission of this proposal. KRT shall provide all of the services requested in the RFP and needed to ensure a successful revaluation.

This proposal will serve to provide the Town with our qualifications and experience in providing similar services in the past. KRT has the capability to perform the services requested while meeting all established deadlines and quality expectations in an effective and efficient manner.

As a small company, KRT's upper management will be solely responsible for all aspects of the valuation process. Our experience, solid references, and proven track record make KRT an excellent candidate to complete the Full Revaluation. KRT is pleased to provide this proposal and we look forward to the opportunity to discuss it with you. Please do not hesitate to contact me if there are any questions or if more information is necessary.

Sincerely,



Robert Tozier
Vice President
KRT Appraisal
Office: (877) 337-5574
Fax: (978) 914-7201
rob_tozier@krtappraisal.com
www.krtappraisal.com

Why Hire KRT Appraisal?

It is with great pleasure that KRT Appraisal (KRT) submits a proposal for a 2028 Full Property Revaluation Project. When it comes to selecting a revaluation firm, KRT knows you have many choices, so what sets KRT apart from the competition? KRT has some of the most experienced team members in New England. KRT offers a personalized approach and level of service that is unmatched by any firm, large or small. KRT is dedicated to completing projects on time and with the utmost quality. KRT is always client focused and takes pride in our work and the relationships we build with clients. KRT's goal is to offer superior services at a competitive price.

Strengths and Advantages of KRT Appraisal

KRT Ownership Heavily Involved in Revaluation Process

KRT was founded by Ken Rodgers and Rob Tozier, two former large appraisal firm managers that know clients deserve more than being just another dollar sign. Ken and Rob are heavily involved in all aspects of the revaluation process, from supervising data collection to running analysis and setting values. No value goes out the door without having been reviewed in some capacity by one of them.

Education and Experience

KRT strives to bring attained knowledge and experience to clients and provide quality over quantity, shedding the large overhead of CEO/CFO salaries. KRT's employees are all certified in the individual states they work in. On average, each appraiser and manager complete over fifteen hours of continuing education credits annually. KRT's upper management has on average almost thirty years of appraisal experience and has successfully implemented over one hundred revaluations of all scopes and sizes. KRT has extensive experience with waterfront properties, knowledge of both commercial and residential properties, and has valued both rural and urban communities. Having a team with extensive knowledge and specialties allows us to ensure the project is done correctly from the ground up to completion.

We are one of the only companies in the area that uses a **Zeb 3D Laser Scanner** and employees trained to use it. It allows us to precisely measure complex commercial or residential properties with speed and accuracy to minimize errors that can result in a loss of revenue or costly abatements.

CAMA Versatility

All KRT employees are experienced and trained on multiple CAMA systems including Vision's Appraisal Vision (all versions), Patriot's AssessPro (all versions), Avitar, and Trio.

KRT Appraisal is a small company that treats its employees like family and each client as they are the only client. This mindset, along with unwavering principles, has helped build KRT from a company of two owners and a client list of zero in 2010, to a family of twenty five plus employees and a growing list of over seventy past and current clients.

STATEMENT OF SERVICES
2028 FULL REVALUATION OF ALL REAL AND PERSONAL PROPERTY

1) PROFILE OF DAMARISCOTTA, MAINE

1.1: Damariscotta, founded in 1794, is a town in Lincoln County, Maine, United States. The population was 2,297 at the 2020 census and has a total area of 14.71 square miles. Damariscotta is known as the oyster capital of New England. It contains approximately 1,840 parcels.

2) SCOPE OF THE PROJECT

2.1: Subject to the terms and conditions of this Statement of Services, KRT shall measure, list and update the value for all classes of property located in the Town of Damariscotta as identified in Section 1 while conforming to Maine State Law and the guidelines in determining "Just Value". The determined "Just Value" will be reflected as of April 1, 2028.

2.2: "Just Value" defined: "In the assessment of property, assessors (Board of Selectmen) in determining just value are to define this term in a manner which recognizes only that value arising from presently possible land use alternatives to which the particular parcel of land being valued may be put. Assessors (Board of Selectmen) must consider the effect upon value of any enforceable restrictions to which the use of the land may be subjected. Restrictions shall include, but are not limited to, zoning restrictions limiting the use of the land, subdivision restrictions, and any recorded contractual provisions limiting the use of the lands. The just value of land is deemed to arise from and is attributable to legally permissible use or uses only." **(36 MRSA §701-A)**

2.3: For purposes of this proposal, the scope will be divided into five (5) main groups of project requirements, each extensively detailed. The five (5) main groups are as follows: Data Collection, Analysis, Field Review, Informal Hearings, and Reporting.

A) Data Collection

2.A.1: Before starting the Revaluation, KRT shall meet with the Town Assessor and local officials to review the Data Collection Manual to ensure that all data will be collected according to the Town's established specifications. If no such manual exists, KRT will provide one to be tailored to the needs of the Town.

2.A.2: KRT will conduct an on-site exterior measurement and attempt an interior inspection of all properties within the Town. All KRT employees will have proper identification (KRT Badge or Town ID) as well as a letter from the Town with a vehicle description and purpose for visiting the property. If entrance is not gained after the initial visit, KRT will leave a door hanger or mail a letter requesting a phone call for an interior inspection.

2.A.3: KRT will verify all information on the property record card. This includes all construction detail, sketch measurements, year built, property condition, outbuildings/extra features, sale conditions, and land detail information. A visit history code with the employee's initials and date will be added for each visit to the property.

2.A.4: KRT will input all data changes at each stage of the revaluation project into the CAMA system.

2.A.5: KRT will take phone calls from door hangers left or letters sent and schedule callback appointments using a schedule convenient for the Town and the taxpayers.

2.A.6: KRT will update the Town's image file by taking a new photo of all improved properties within the Town. This photo will be at least six (6) megapixels and loaded into the CAMA System.

B) Analysis

2.B.1: KRT will analyze all qualified sales for the time period of two (2) years prior to the assessment date of April 1, 2028. All strata tested (style, size, sale price, age, sale date, neighborhood, and grade) will be within five percent (5%) of the desired median for all classes of property. KRT assumes the Town would like to have values reflect 100% of market value.

2.B.2: KRT will compute, to the nearest One Hundred Dollars (\$100), the value of all properties within the scope of this Statement of Services.

2.B.3: Land values will be established for all properties within the Town by analyzing vacant land sales for a period of two (2) years. If there is insufficient data, a land residual technique will be utilized. Factors to be considered in land valuation shall include neighborhood, lot size, zoning restrictions, shape, topography and all other factors deemed relevant after further investigation.

2.B.4: Residential building values will be generated utilizing a "market adjusted" cost approach. To achieve this, a cost analysis will be done to determine the Replacement Cost New (RCN) for all types of building within the Town. Factor's to be considered include the style, grade or quality, size, number of bedrooms and bathrooms, and other various amenities that affect value. Once the RCN is established, an analysis of the physical condition of the property relative to its age will be conducted. The resulting depreciation tables will calculate a depreciation percentage. Once the depreciated building value is established, it is added to any outbuildings and the land value to come up with the overall market value. All values and tables are generated directly from the sales analysis.

2.B.5: Commercial values will be generated utilizing both the “market adjusted” cost approach and the income approach. KRT will make a thorough analysis of income and expense data reported on the Income and Expense forms returned to the Town as well as cap rates using a current publication of the Investor’s Survey. Information gathered such as income/rents, vacancy, and expenses will be compiled in the income tables and used to determine the value for the income approach. This value is then reconciled to within ten percent (10%) of the “market adjusted” cost value. KRT shall be responsible for costs associated with mailing Income and Expense forms.

2.B.6: KRT shall update all tables (building, land, yard items, depreciation and income) as well as the cost modeling as dictated by the sales analysis.

C) Field Review

2.C.1: KRT will review all sale properties in the field. The personnel conducting this phase of the program will have a minimum of five (5) years of mass appraisal experience and be a Certified Maine Assessor (CMA).

2.C.2: KRT will review all properties in the field. It is understood that KRT will have the ability to exercise good judgment in making final value estimates. KRT, to ensure valuation accuracy and consistency, will have no more than two (2) field review appraisers work in the Town.

2.C.3: KRT shall review the current delineation of all neighborhoods and make changes based on data extracted during the sales analysis.

D) Informal Hearings

2.D.1: Once the preliminary values have been approved by the Town KRT will develop an Assessment Change Notice. The notice will, at a minimum, contain the following information: brief description of the assessment process, how to appeal, the phone number to call to schedule a hearing, parcel MBLU, parcel ID number, property location, owner’s address, and the total parcel value.

2.D.2: KRT will be responsible for mailing the notice and all associated postage. KRT will take the phone calls and schedule all hearings on a schedule approved by the Town. Hearings will take place at a convenient location designated by the Town as well as over the phone for property owners who are unavailable during the day to meet in person.

2.D.3: KRT will conduct the informal hearings. Skilled personnel with past hearing experience will be available for all work relating to the hearings and other taxpayer inquiries. A schedule will be available at the hearings to re-inspect properties that warrant a site visit in order to consider the requested change.

2.D.4: KRT will consider all credible information brought forth by a taxpayer at a hearing and make the necessary changes. KRT will look for any patterns to see if any particular market areas or groups need to be reviewed as a result of information provided by the taxpayers.

2.D.5: KRT will hold hearings for a period of at least five (5) days. As mentioned, phone hearings can be offered in-lieu of or in addition to in-person meetings. KRT will ensure that every property owner who calls to request a hearing within the allotted timeframe shall have a hearing.

2.D.6: KRT will send all taxpayers who came in for an informal hearing a final letter notifying the taxpayer of their post-hearing value. This letter will briefly explain the taxpayer's next course of action if they are still displeased with their assessment.

E) Reporting/Defense

2.E.1: KRT will submit to the Town one (1) assessment manual titled "*Assessment Manual, for the Town of Damariscotta, Maine*" which contains procedures, analysis, and standards, as well as classifications for all types of property. Delivery of this final USPAP compliant documentation manual will be made by October 31, 2028.

2.E.2 KRT shall provide ten (10) days for defense of value services for all appeals to any Local, County or State Board. Any days beyond the five shall be billed as outlined in Section A of this proposal.

3) PUBLIC RELATIONS

3.1: KRT will take measures at all stages of the project to foster and maintain good relations with the Town of Damariscotta's taxpayers, Town Officials, Agents, and Town Employees.

3.2: KRT, if requested by the Town, will hold an informational meeting(s) for the Damariscotta taxpayers. This meeting(s) will serve to inform and educate the public at large about the following points:

- a) Necessity of a Revaluation.
- b) Progress and status of the project.
- c) Goals of the project.
- d) Roles of the Town and KRT.
- e) Qualifications of KRT.
- f) Necessity of taxpayer cooperation.
- g) Disclosure aspects throughout the project.
- h) On-going nature of completed system.

3.3: KRT shall make available the project supervisor for all speaking endeavors and meetings with various groups as a means of establishing and promoting understanding and support

for the Full Revaluation program. KRT shall supply visual aids and other media at its disposal to this end. All prepared releases shall be submitted to the Town for review prior to public dissemination.

4) PROGRESS AND CONTROL

4.1: It is recognized that the plan for operation may require alteration from time to time and the Town shall not unreasonably require strict adherence to the plan, however, any change in starting date or completion date must be requested in writing by KRT and must be approved by the Town. Below is the proposed Revaluation timeline:

<u>Task</u>	<u>Start Date</u>	<u>Completion Date</u>
Execution of Contract	03/03/25	03/14/25
Start-Up Meeting	03/17/25	04/04/25
Public Relations	On-going	
Software Conversion	04/07/25	06/27/25
Data Collection/Callbacks	06/30/25	01/14/28
Data Entry	06/30/25	01/21/28
Field Review Sales	01/24/28	02/04/28
Update Tables	02/07/28	03/03/28
Field Review	03/06/28	04/14/28
Final Valuations	04/17/28	05/19/28
Town Review	05/22/28	06/02/28
Impact Notices	06/05/28	06/09/28
Informal Hearings	06/12/28	06/30/28
Hearing Review	07/03/28	07/14/28
Final Products Delivered	07/17/28	07/21/28
Project Completion		07/21/28

4.2: The Town may grant an extension of the completion date not to exceed thirty (30) days to conclude any additional work required under the terms herein specified with respect to alterations, additions, subdivisions, where circumstances beyond KRT's control, and not due to its own acts or omissions, tend to delay completion of the project. Such extension shall only be made after written submission by KRT stating the reasons for an extension request.

4.3: The Town shall charge KRT a penalty using the following schedule for failure to turn over all deliverables required by the contract deadline date of July 21, 2028:

- a) 1 to 10 working days = \$100/day
- b) 11 to 20 working days = \$250/day
- c) Over 20 working days = \$500/day

4.4: KRT shall submit a project status report every month for the duration of the project.

5) EQUIPMENT AND SUPPLIES

5.1: The Town will provide KRT with the following equipment and supplies available for the duration of the project:

- a) Adequate office space with furniture and chairs.
- b) A computer for remote access.
- c) Access to a telephone for local calls.
- d) Two (2) sets of current tax maps as well as the most current zoning map.

5.2: The Town shall cooperate with KRT by providing the following from current records if requested:

- a) All available building permit information.
- b) All available zoning information.
- c) All available ownership records.
- d) All available land classification information.
- e) All available sales data.
- f) Prior assessed values.

The Town shall further assist KRT in providing or making available any information in its' possession or is conveniently available that may be required for the execution of the project.

5.3: KRT will be responsible for delivering the following to the Town:

- a) Database in good working order with updated values.
- b) A USPAP manual detailing the methodology used on this project.

5.4: All records, computations, maps, manuals, cards, computer discs and other electronic data, photographs, schedules, tables, reports, etc. of KRT in respect to any work related to the project shall be left in custody and become Town property.

6) PAYMENT SCHEDULE

6.1: In addition to quarterly status reports, KRT will submit a monthly invoice based on the portion of work completed during the preceding month. The invoice shall include the percentage relationship of all work completed thus far in relation to the total contract, the total payment previously made, the payment requested for the month, and the total payment requested to date.

6.2: The Town may require KRT to submit substantiating production reports from the project manager prior to making any payments on the contract.

6.3: The Town is required to make timely percentage payments on the contract to KRT, within thirty (30) days, equal to eighty percent (80%) of the contract amount represented by work completed during the month.

6.4: If the Town determines that KRT's invoice is inaccurate, the Town shall give a written notice specifying exactly which portion(s) is found to be unsatisfactory. KRT shall make every effort to correct the inaccuracy. The Town shall retain the right to delay payment, only for the specified item(s), until said item(s) is resolved to the satisfaction of both the Town and KRT. Upon satisfactory resolution, the Town shall pay KRT said amount due, less twenty percent (20%).

6.5: The twenty percent retainage shall be released using the following schedule:

- a) Eighteen percent (18%) once final notices have been mailed from the informal hearings, and;
- b) Two percent (2%) once the revaluation USPAP manual has been received by the Town.

7) INSURANCE

7.1: KRT, working as an independent contractor, shall carry and maintain in force professional and general liability insurance, as well as worker's compensation insurance. KRT shall save the Town, its agents, servants, and employees harmless, at KRT's sole expense, to any liability or legal proceeding occurring as a result of KRT's actions or omissions, including injury, death, property damage, or any associated expense(s) including costs of defense and reasonable attorney's fees.

7.2: KRT's general liability policy has limits of two million dollars (\$2,000,000) per occurrence and four million dollars (\$4,000,000) aggregate. This policy provides comprehensive coverage against claims for personal injury, death, or property damage.

7.3: KRT's professional liability policy has limits of one million dollars (\$1,000,000) per occurrence and one million dollars (\$1,000,000) aggregate.

7.4: All of KRT's employees shall carry adequate automobile insurance to provide comprehensive coverage of one million dollars (\$1,000,000) each person/each occurrence for bodily injury liability.

7.5: All insurance documentation shall be made available within thirty (30) days if awarded a contract.

8) TERMINATION

8.1: Force Majeure: Neither party shall be liable to the other or deemed to be in breach under the agreement for any failure to perform including, without limitation, a delay in rendering performance due to causes beyond its reasonable control, such as an order, injunction, judgment, or determination of any Court of the United States, or the State of Maine, an Act of God, war, civil disobedience, extraordinary weather conditions, labor disputes, shortages or fluctuation in electric power, heat, light, or air conditioning. Dates or time of performance will be extended automatically to the extent of such delays provided that the party whose performance is affected notifies the other promptly of the existence and nature of such delay. It is agreed, however, that since the performance dates of this contract are important to the implementation of ongoing property value update programs, continued failure to perform for periods aggregating sixty (60) or more days even for causes beyond the control of KRT, shall be deemed to render performance impossible, and the Town shall thereafter have the right to terminate this agreement in accordance with the provisions of the section entitled, "Termination."

8.2: Subject to the provisions of the section entitled "Force Majeure", if KRT shall fail to fulfill in a timely and satisfactory manner its obligations under this agreement, or if KRT violates any covenants, conditions, or stipulations of this agreement, which failure or violation shall continue for twenty-one (21) business days after written notice of such failure or violation is received by KRT, then the Town shall thereupon have the right to terminate this agreement by giving written notice to KRT of such termination and specifying the effective date thereof, at least seven (7) days before the effective date of such termination.

9) ASSIGNMENT OF CONTRACT

9.1: KRT shall not assign or in any way transfer any interest in this agreement without the prior written consent of the Town, provided however, that claims for money due or to become due to KRT from the Town hereunder may be assigned to a bank, trust company, or other financial institution without such consent, so long as notice of any such assignment is furnished promptly to the Town, any such assignment shall be expressly made subject to all defenses, set offs, or counterclaims which would have been available to the Town against KRT in the absence of such assignment.

10) PERFORMANCE BOND

10.1: In-Lieu of a performance bond, KRT requests the Town hold an additional 10% retainage for a total of 20%.

KRT APPRAISAL **COMPANY PROFILE**

Located in Haverhill, Massachusetts, and founded in April 2010, KRT provides superior revaluation services for municipalities throughout New England. KRT brings a fresh and innovative approach to Revaluation services by listening to the client's needs and working with them to produce a high-quality product. Our goal is to exceed the expectations of every client by offering competitive pricing, on time project completion, and outstanding customer service. Our associates are distinguished by their technical expertise combined with their hands-on experience, thereby ensuring that our clients receive the most effective and professional service. Typically, we are on-location handling client contact and providing technical training and support to the office staff. KRT offers a wide variety of services. These services include:

- ❖ Data Collection
- ❖ Digital Imaging
- ❖ Building Permit Review
- ❖ Field/Desk Reviews
- ❖ Data Quality Studies
- ❖ Consulting
- ❖ Abatement Review
- ❖ Full Revaluations
- ❖ Statistical Updates
- ❖ Personal Property Listing and Valuation
- ❖ Contract Assessing

KRT believes in harnessing technology, which is why we give our associates the tools and training they need to get the project done in the most effective manner. We pride ourselves on our proven track record for administering multiple projects. This is due to successfully managing team members to utilize all the technology that is available to them.

Over the last decade or so, many Municipal budgets have been strained. This has dramatically changed the way local governments operate. In attempting to be more fiscally conscious, all budgeted items have come under great scrutiny. This is especially evident in appraisal and assessment administration. KRT was created with this in mind. As a small company, KRT can offer more hands-on services at competitive prices.

KRT APPRAISAL QUALIFICATIONS

1) PROJECT STAFFING

KRT will be responsible for the supervision of all phases of the revaluation and will employ the following organizational structure to manage the project:

Title	Name	Years of Experience
Project Manager	Kenneth Rodgers, CMA4	34 Years
Appraiser	Robert Tozier, CMA	24 Years
Appraiser	Kevin Leen, CMA	39 Years
Data Collector	Doug Rollins	10 Years
Data Collector	Gerry Lortie	8 Years
Data Collector	Austin Bengtson	1 Year
Personal Property Specialist	James Venuti	29 Years

Resumes of each KRT associate are provided in this proposal. Each resume contains prior work experience, positions held, responsibilities of each position, appraisal/assessing education and professional affiliations for each individual. No KRT associate employed on this project shall be under the legal age (18 Years).

Any proposed changes in the project staffing plan will be submitted to the Town, in writing, for review and approval. The Town shall notify KRT of the acceptance or rejection of any staff substitutions within ten (10) business days of receipt of the proposed changes. The Town shall reserve the right to make final determination regarding the acceptability of the proposed personnel changes.

2) REFERENCES/CURRENT ASSIGNMENTS

KRT has completed dozens of Revaluations/Updates over the past five years. KRT has valued some of the most diverse communities in New England, including many Towns of similar size. The following page contains a complete list of those projects as well as KRT's current commitments.

KRT Appraisal Current/Completed Work Over Five Years

<u>City/Town</u>	<u>Approx Size</u>	<u>Services</u>	<u>Year</u>	<u>Contact</u>	<u>Phone Number</u>
Auburn, ME	9,460	Full Revaluation	2027	Karen Scammon	(207) 333-6601
Appleton, ME	1,132	Full Revaluation	2027	Lorie Costigan	(207) 785-4722
Durham, ME	2,188	Full Revaluation	2027	Jerry Douglass	(207) 353-2561
St. George, ME	2,815	Full Revaluation	2027	Brandon Leppanan	(207) 372-6363
Gardiner, ME	2,715	Full Revaluation	2027	Curt Lebel	(207) 582-6892
Bangor, ME	11,065	Full Revaluation	2026	Phil Drew	(207) 992-4211
Augusta, ME	8,900	Statistical Revaluation	2026	Kristy Sheehan	(207) 626-2320
Oakland, ME	3,530	Full Revaluation	2026	Nicole Stenberg	(207) 465-2750
Raymond, ME	3,900	Full Revaluation	2026	Curt Lebel	(207) 655-4742
Danville, NH	2,110	Contract Assessor, Cyclical Revaluation (2023-2026)	2026	Kimberly Burnham	(603) 382-8253
South Berwick, ME	3,400	Full Revaluation	2025	Verna Sharpe	(207) 384-3010
Rockport, ME	6,260	Full Revaluation	2025	Kerry Leichtman	(207) 236-6758
Monmouth, ME	2,775	Full Revaluation	2025	Justin Poirier	(207) 481-9400
Saco, ME	421	Commercial Full Revaluation	2025	Kate Kern	(207) 282-1611
Waterford, ME	1,925	Full Revaluation	2025	John Bell	(207) 583-4403
Farmington, ME	3,705	Full Revaluation	2025	Erica LaCroix	(207) 778-6538
Nobleboro, ME	1,650	Full Revaluation	2025	Dennis Reed	(207) 563-8816
Starks, ME	725	Full Revaluation	Current	Erin Norton	(207) 696-8069
Norwich, VT	1,580	Full Revaluation	Current	Cheryl Lindberg	(802) 649-1419
Haverhill, NH	3,800	Contract Assessor	Current	Brigitte Codling	(603) 787-6800
Lisbon, NH	1,300	Contract Assessor	Current	Krystle Dow	(603) 838-6376
Warren, NH	1,050	Cyclical Revaluation (2022-2026)	Current	Austin Albro	(603) 764-7705
Littleton, NH	3,400	Contract Assessor	Current	Jim Gleason	(603) 444-3996
Landaff, NH	550	Contract Assessor, Cyclical Revaluation (2022-2026)	Current	Jennifer Locke	(603) 838-2308
Strafford, NH	3,500	Contract Assessor	Current	Ellen White	(603) 664-2192
Belmont, NH	4,300	Contract Assessor	Current	Alicia Jipson	(603) 267-8300
Warren, NH	1,050	Contract Assessor	Current	Austin Albro	(603) 764-7705
New Sharon, ME	1,275	Full Revaluation	2024	Paula Nason	(207) 778-4046
Haverhill, NH	3,800	Statistical Revaluation	2024	Rod O'Shana	(603) 787-6800
Duxbury, MA	150	C&I Revaluation	2024	Steve Dunn	(781) 934-1100
Gray, ME	4,995	Full Revaluation	2024	Nate Rudy	(207) 657-3339
Camden, ME	3,230	Full Revaluation	2024	Kerry Leichtman	(207) 236-3353
Putney, VT	1,100	Full Revaluation	2024	Geordie Heller	(802) 387-5862
Windsor, ME	1,620	Full Revaluation	2024	Theresa Haskell	(207) 445-2598
Grantham, NH	2,500	Contract Assessor	2024	Melissa White	(603) 863-6021
Buckfield, ME	1,415	Full Revaluation	2024	Cameron Hinkley	(207) 336-2521
Belmont, NH	4,300	Statistical Revaluation (Years 2022, 2023 and 2024)	2024	Alicia Jipson	(603) 267-8300
Rindge, NH	2,800	Contract Assessor	2023	Lori Rautiola	(603) 899-5181
Bethlehem, NH	2,200	Contract Assessor	2023	Mary Moritz	(603) 869-3351
Troy, NH	1,200	Contract Assessor	2023	Mary Guild	(603) 242-7722
Nantucket, MA	9,500	C&I Interim Revaluation, Commercial Data Collection	2023	Rob Ranney	(508) 228-7200
Sullivan, ME	1,275	Full Revaluation	2023	Stacy Tozier	(207) 422-6282
Cape Elizabeth, ME	4,500	Full Revaluation (Finished in 2023, implementing in 2024)	2023	Clint Swett	(207) 799-1619
Bethlehem, NH	2,200	Cyclical Revaluation (2021-2023)	2023	Mary Moritz	(603) 869-3351
Gorham, NH	1,700	Contract Assessor	2023	Michelle Lutz	(603) 466-3322
Kingston, NH	3,150	Contract Assessor/Cyclical Revaluation (2019-2023)	2023	Susan Ayer	(603) 642-3342
Biddeford, ME	800	Commercial Revaluation	2023	Nicholas Desjardins	(207) 284-9003
Troy, NH	1,200	Full Revaluation	2023	Mary Guild	(603) 242-7722
Oxford, ME	2,975	Full Revaluation	2023	Adam Garland	(207) 539-4431
Franklin, NH	3,750	Statistical Revaluation	2023	Judie Milner	(603) 934-3900
Winslow, ME	3,300	Cyclical Revaluation (2021-2023)	2023	Judy Mathiau	(207) 872-2776
Gorham, NH	1,700	Cyclical Revaluation (2019-2022)	2022	Michelle Lutz	(603) 466-3322
Grantham, NH	2,500	Statistical Revaluation	2022	Melissa White	(603) 863-6021
Amherst, NH	5,000	Contract Assessor/Cyclical Data Collection	2022	Gail Stout	(603) 673-6041



Town of Rockport, Maine

Assessing Department

101 Main Street
Rockport, Maine 04856
Telephone: 207. 236.6758 ext5
Fax: 207.230.0112

Kerry Leichtman, Assessor

kleichtman@rockportmaine.gov
Caitlin Thompson, Assistant Assessor
cthompson@rockportmaine.gov
Molli Bennett, Admin Assistant
mbennett@rockportmaine.gov

May 16, 2022

To Whom This May Concern:

I first became aware of KRT Appraisal in 2014 as we were preparing to conduct a town-wide revaluation, our first in Rockport since 2005. KRT began the work in early 2015. Because of a restriction I placed on their work, I can offer you commentary based on a great deal of first-hand observation. That restriction was that I wanted to work with KRT. I didn't want them to come to Rockport, do the reval, then hand me a book of results and leave. I wanted to participate so that when they did leave I would be able to explain and defend the reval.

I visited properties with KRT, made decisions regarding neighborhood delininations, construction grades and depreciation conditions, and attended hearings.

Rockport was still stuck in the recession in 2015. People were nervous about the reval. KRT and I did a lot of PR, explaining the process and calming people down wherever possible. Once the reval was finished we held hearings. I sat in on at least half of them. Some taxpayers expressed a lack of confidence in the company "from away" and requested that I attend their hearing. The company from away did fine. They exhibited compassion at people's angst but did not compromise their professionalism. They did not change values because of a compelling story, but they did make the story tellers understand they were listened to. And they readily changed values when new, useful information came to light.

There were, of course, a few people who could not/would not be satisfied, but those people aren't satisfied with me either – they simply don't want to pay taxes. Every municipality has a handful of them. KRT showed the same patience and professionalism with them as they did with the more routine situations.

I was so pleased with KRT's work that I hired them again in Camden (the two towns have an agreement whereby my assistant assessor and I assess both towns). This time KRT was not the lowest bidder but we chose them anyway, because my experience in Rockport was so positive.

In Rockport, we only visited properties that had sold during the previous two years. We changed the parameters in Camden so that we visited every property. Again, I worked with KRT as much as my time would allow. We visited properties, made valuation decisions together, and conducted hearings. The results were the same. At the reval's conclusion, all of my ratios fell between 94 and 99% and my quality ratings were under 10. The work was completed on time. Almost all of my taxpayers were fine with the results. Again, those who weren't weren't going to be happy with anything.

Despite my hands-on involvement I called KRT many times after the revals to get particulars on how a property was valued. It always amazed me at how well they remembered details about a site visit or a conversation they'd had with a taxpayer.

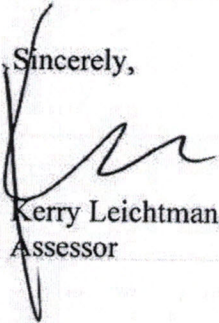
Long after the revals, I would still, on occasion, call KRT with questions when stumped on an assessing issue or about using Vision software because I'm so impressed with how well KRT knows assessing and how much experience they've had in so many different valuation situations. I have a tremendous amount of respect for their capabilities, and appreciation for their willingness to be involved beyond the contract.

Now in 2022, real estate values have dramatically increased in Camden and Rockport. My ratios, which were declining gracefully by a few points each year, crashed through the floor hitting unimagined lows. Camden last year was 91%. This year 75%. Rockport went from 90% to 79%. I did not hesitate to retain KRT to help me get values back on track. Together, we studied my local market and made appropriate adjustments. Then held hearings and made further adjustments as necessary.

I have recommended and continue to recommend KRT to my colleagues here in Maine, without hesitation.

If you have any follow-up questions I'd be pleased to address them.

Sincerely,

A handwritten signature in black ink, appearing to read 'Kerry Leichtman', is written over the printed name and title.

Kerry Leichtman, CMA
Assessor



Assessor's Office • 1 Union Square • Milford, NH 03055
Phone 603.249-0615 • Fax 603.673.2273
www.milford.nh.gov

May 16, 2022

To Whom It May Concern,

I have been the Chief Assessor in Milford NH since September of 2008. In that capacity I have had several opportunities to work closely with KRT Appraisal (KRT), where KRT has completed several statistical revaluations including 2011, 2016, and 2021 as well as two partial revaluation in 2013 and 2019. Each time Milford has prepared to conduct revaluation work, KRT rose to the top during the competitive bidding process and were ultimately hired by the town to complete the work. In every instance, I have found Rob Tozier and Ken Rodgers and their staff competent, reliable, knowledgeable and always accessible to address questions and concerns that have arisen. Each contract was completed in a timely manner; the follow-up for hearings was respectful and efficient, and concerns were addressed quickly and fully.

It's a given that revaluations can be anxiety producing for tax payers. The KRT team, from data collectors to President, treated every taxpayer with respect and patience, remained positive and helpful in their attitude throughout the process, and provided follow-up support whenever asked. The nature of assessments today, with the busy schedules of taxpayers, makes it impossible to enter every home, but when interior estimates were required or requested, they were done with reasonableness and care. While every revaluation will have some abatement requests where individual assessments are further fine-tuned on the granular level, I can attest that these were minimal and usually reasonable resolved.

I appreciate the opportunity to describe my experiences with KRT appraisal and would highly recommend their services.

Sincerely,

Marti Noel, Assessor CNHA
Milford, NH 03055
mnoel@milford.nh.gov



THE CITY OF NASHUA

"The Gate City"

*Financial Services Division
Office of the Chief Financial Officer*

December 17, 2019

To Whom It May Concern:

The City of Nashua contracted with KRT Appraisal for a full statistical revaluation during 2018. I served as the contracting officer for this project. I found both Ken Rodgers and Rob Tozier very knowledgeable, professional, responsive and reliable. We had a very tight deadline to complete the project and KRT met each and every deliverable. The City of Nashua has over 29,000 parcels which made the revaluation quite challenging.

Of significant note was KRT's involvement in the informal hearings that were held in each of the City's nine wards. We had not held such informal hearings in several years and as the City's valuation rose from \$8 billion to \$10 billion with this revaluation, it was extremely important that residents and businesses had a venue to be heard prior to the publication of the final values.

Ken and Rob were always accessible during the entire project, which was much appreciated by the City's administrative team.

I would highly recommend KRT Appraisal without hesitation.

Sincerely,

John L. Griffin

Chief Financial Officer

KENNETH J. RODGERS

MASS APPRAISAL EXPERIENCE

KRT Appraisal, Haverhill, MA

04/10- Present

President/Project Director - Responsible for the overall operations of the appraisal company. Duties include budgeting, marketing, payroll, and management of all appraisal operations. Also responsible for planning, implementing, and running revaluation projects for municipalities. Specific duties include the mass appraisal of residential, commercial, industrial, and personal property accounts. Duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings and all reporting requirements as they relate to project certification.

Vision Appraisal Technology, Northborough, MA

01/07-04/10

District Appraisal Manager - Responsible for planning, implementing, and supervising revaluation projects for various municipalities. Specific duties include supervising project managers, appraisal staff and data collectors on multiple mass appraisal projects. Duties include public relations, statistical analysis and model calibration, and defense of values.

1/01- 12/06

Project Manager - Responsible for planning, implementing, and running revaluation projects for various municipalities. Specific duties include the mass appraisal of residential, commercial, industrial, and personal property accounts. Duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings and all reporting requirements as they relate to project certification.

Assessing Department, Town of Auburn, MA

04/96- 01/01

Chief Assessor - Responsible for the appraisal and assessment of 6,800 taxable residential, commercial, industrial, and personal property accounts with an assessed value in excess of 1 billion dollars.

Responsible for the daily operations of the Assessing Department. Specific duties include budgetary planning, public relations, new growth, taxpayer inquire and appeal, testifying on behalf of the Board of Assessors at hearings before the Appellate Tax Board, preparation of the tax rate information as well as the annual Classification Hearing, and providing leadership, guidance, and direction to the staff.

Responsible for the Department of Revenue certification procedures. Specific duties include revaluation implementation, measuring and listing properties, sales verification, data quality studies, statistical analysis, residential modeling and calibration, sales ratio studies, and all reporting documentation for the Department of Revenue.

Assessing Department, Town of Northborough, MA

07/98- 06/01

Part-time Board Member - Responsibilities include weekly Board of Assessor meetings, abatement inspections, voting on abatements and exemptions, and other duties specific to the overall operation of the Assessor's Office.

PROFESSIONAL DESIGNATIONS AND CERTIFICATIONS:

Massachusetts Accredited Assessor (MAA) inactive

Certified Maine Assessor-(CMA)

Certified Assessor Supervisor, Department of Revenue Administration, New Hampshire

Certified Project Supervisor, Department of Taxes, State of Vermont

EDUCATION, MILITARY AND APPRAISAL COURSES:

United States Marine Corps, Honorable Discharge
Haverhill High School, Haverhill MA

International Association of Assessing Officers/McKissock:

Commercial Land Valuation
Appraisal of Industrial and Flex Buildings
Appraisal of Owner-Occupied Commercial Properties
2024-2025 USPAP Update
Appraisal of Fast-Food Facilities
The Basics of Expert Witness for Commercial Appraisers
Expert Witness Testimony for Appraisers
Appraisal of Assisted Living Facilities
Marshall & Swift Residential
Marshall & Swift Commercial
Depreciation Analysis Workshop
Appraising Single Tenant Distribution Centers
Appraising Self-Storage Facilities
Tax Policy
Principles and Techniques of Cadastral Mapping
Mass Appraisal of Residential Properties
Assessment Administration
Income Approach to Value
Fundamentals of Mass Appraisal
Fundamentals of Real Property Appraisal
Fundamentals of Assessment Ratio Studies
Site Analysis
Understanding Real Property Appraisal
Intermediate Income Approach Case Studies for Commercial Appraisers
Introduction to Commercial Appraisal Review

Massachusetts Association of Assessing Officers:

Demonstration Appraisal Report Writing
Principles of Assessment Procedure
Assessment Administration, Department of Revenue
Personal Property Auditing

Other Related Courses and Seminars:

New Hampshire Statutes Update Course
New Hampshire Statutes Course 1 and 2
Multiple Regression Analysis, SPSS
Intro to Statistics, SPSS
Data Management, SPSS
Exterior Construction Components, MBREA
Project Management, AMA
Geographical Information Systems, IAAO
Appraising 1-4 Family Properties; J.M.B. Real Estate Academy
USPAP, J.M.B. Real Estate Academy (15 Hour)
Course 1A; Massachusetts Board of Real Estate Appraisers

Expert Witness

Massachusetts Appellate Tax Board
New Hampshire Board of Land and Tax Appeals
New Hampshire Superior Court
Maine Board of Assessment Review
Maine County Commissioners

ROBERT A. TOZIER

MASS APPRAISAL EXPERIENCE

KRT APPRAISAL, HAVERHILL, MA

04/2010- Vice President/Project Manager

Present Responsible in part for all aspects of daily operations including proposals, contracts, budgeting, marketing, customer acquisition, and company growth. Responsible for planning, implementing and running revaluation projects for municipalities. Duties include the mass appraisal of residential, commercial, industrial, and exempt properties. Specific duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings, defense of values, and generation of USPAP compliant revaluation manuals.

VISION APPRAISAL TECHNOLOGY, NORTHBOROUGH, MA

10/2006- Project Manager

04/2010 Responsible for planning, implementing and running revaluation projects for municipalities. Duties include the mass appraisal of residential, commercial, industrial, and exempt properties. Specific duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings, defense of values, and all reporting requirements as they relate to project certification.

05/2003- Staff Appraiser/Assistant Project Manager

09/2006 Review residential and commercial properties for revaluation purposes. Responsibilities include delineating neighborhoods and setting factors for land based on market data, review and analyze income and expense reports for commercial and industrial properties, market research and formulation of cap rates, commercial and industrial review and reconciliation.

COLE LAYER TRUMBLE, TOLLAND, CT

12/2000- Appraiser Trainee

05/2003 Worked on Revaluations in over twenty cities and towns across New England and Nation-wide. Duties included residential and commercial listing, quality control, permit pick-ups, sales verification, pre-review, final review, informal hearings, and training/supervising data collectors in the field.

EDUCATION

Keene State College, Keene, NH (1996-2001)

B.S. Health & Fitness

American International College, Springfield, MA (1995-1996)

Physical Therapy Undergraduate Coursework

APPRAISAL EDUCATION/CERTIFICATIONS

IAAO/Appraisal Institute

- 1) Fundamentals of Real Estate Appraisal (2002)
- 2) NH State Statutes Part 1 (2010)
- 3) NH State Statutes Part 2 (2010)
- 4) Mathematics for Assessors (2012)
- 5) Site Analysis (2012)
- 6) Assessment Administration (2013)
- 7) NH State Statute One Day Update (2016)
- 8) Understanding Real Property Appraisal (2017)
- 9) Intro to the Sales Comparison Approach (2018)
- 10) Workshop 171-Standards of Professional Practice and Ethics (2018)
- 11) Workshop 155-Depreciation Analysis (2018)
- 12) Forum 960-Marshall & Swift Residential Square Foot Method (2019)
- 13) Forum 962-Marshall & Swift Commercial Square Foot Method (2019)
- 14) NH State Statute One Day Update (2020)
- 15) USPAP 7 Hour Update (2021)
- 16) Workshop 171-Standards of Professional Practice and Ethics (2021)
- 17) Forum 917-How to Critique an Appraisal (2024)

JMB Real Estate Academy, Lowell, MA

- 1) Basics of Real Estate Appraisal (2001)
- 2) Appraising Income Properties (2003)
- 3) USPAP (2003)
- 4) USPAP 7 Hour Update (2010, 2016)

Massachusetts Association of Assessing Officers

- 1) Mass Appraisal of Real Property (2005)
- 2) Personal Property Auditing (2010)

Maine Association of Assessing Officers

- 1) Low-End Residential Properties (2021)
- 2) Valuation of Mobile Home Parks (2021)

State Of New Hampshire Department of Revenue Administration: Certified Property Supervisor.

Certified Maine Assessor (CMA) No. 764

State of Vermont Department of Taxes, Property Valuation and Review Division: Approved Project Supervisor

KEVIN T. LEEN

MASS APPRAISAL EXPERIENCE

KRT APPRAISAL, HAVERHILL, MA

04/2018- Senior Appraiser/Project Manager

Present Responsible for budgeting, planning, implementing, & running revaluation projects for various municipalities. Specific duties include the mass appraisal of residential & commercial properties. Duties include property sales review & verification via applicable state forms & recorded legal instruments, statistical analysis, analyze & interpret financial statements, model calibration, the supervision of data collectors & field review appraisers, taxpayer hearings, assist assessing clients with CAMA systems, all reporting requirements relating to project certification & USPAP-compliant mass assessment manuals, & jurisdictional ad valorem defense of value.

VISION GOVERNMENT SOLUTIONS, NORTHBOROUGH, MA

08/2004- Senior Appraiser/Project Manager

04/2018 Responsible for budgeting, planning, implementing, & running revaluation projects for various municipalities. Specific duties include the mass appraisal of residential and commercial properties. Duties include property sales review & sales verification via applicable state forms & recorded legal instruments, statistical market analysis, model calibration, analyze & interpret financial statements, GIS parcel mapping valuation, the supervision of data collectors & field review appraisers, taxpayer hearings, assist municipal assessing clients with CAMA systems & public relations, all reporting requirements relating to project certification & USPAP-compliant mass assessment manuals, & jurisdictional ad valorem defense of value.

09/2001- Senior Appraiser

08/2004 Review residential & commercial properties for revaluation purposes. Responsibilities include sales & non-sales review, sales verification via applicable state forms & recorded legal instruments, statistical market analysis, set neighborhood factors for land based on sales analysis, establish land & building methodology, building cost pricing & analysis, analyze & interpret financial statements, GIS parcel mapping valuation, coordinate field review operations, taxpayer hearings & assist in client consultations. Assist in reporting requirements in relation to project certification & USPAP-compliant assessment manuals, & jurisdictional ad valorem defense of value.

04/1999- Staff Appraiser

09/2001 Review residential properties for revaluation purposes. Responsible for overseeing sales data collection, sales verification via applicable state forms & recorded legal instruments, total data collection efforts & completing complex data collection assignments which may be beyond the scope of normal data collection personnel, quality control of data, & hearings with taxpayers. Maintaining a high level of operating competence & efficiency and monitoring & evaluation of the data collection personnel.

PROFESSIONAL APPRAISAL EXPERIENCE

1993 – 1999 **INDEPENDENT CONTRACTOR, HAMPTON, NH**
Fee Appraiser

1985 - 1993 **ABLE APPRAISAL SERVICES, NASHUA, NH**
Staff Fee Appraiser

EDUCATION

Boston College, Chestnut Hill, MA
Bachelor of Arts

APPRAISAL EDUCATION

101 Introduction to Appraising Real Property
102 Applied Residential Property Valuation
410 Standards of Professional Appraisal Practice, Part A
420 Standards of Professional Appraisal Practice, Part B
The Expert Witness/ Introduction to Review Appraisal
Residential & Commercial Building Components
Valuing Apartment Buildings/ Factory Built Housing
Supporting Sales Comparison Grid Adjustments for Residential Properties
IAAO Course 300: Fundamentals of Mass Appraisal
MAAO Course 3: The Income Approach to Value
Residential Report Writing Case Studies/Excel for Assessors
Issues Pertaining to Shoreland Properties-Maine
IAAO Course 400: Assessment Administration
Maine IAAO: Valuing Large Scale Solar
IAAO Course 171: Standards of Professional Practice & Ethics
Maine Revenue Service: Low-End Residential Properties
Maine Revenue Service: Valuation of Mobile Home Parks
McKissock Learning: Land & Site Valuation
NHAAO/State of New Hampshire DRA State Statues Part 1 (2010) & Part II (2010)
NHAAO/State of New Hampshire DRA State Statues Update (2018)
National USPAP Update Course (1999), (2003), (2007), (2012), (2014), (2016), (2018)

CERTIFICATIONS/SPECIAL QUALIFICATIONS

State of New Hampshire: Certified Residential Appraiser, NHCR385 (Inactive)
State of New Hampshire Department of Revenue Administration:
Certified Real Estate Appraiser Supervisor #214
New Hampshire Board of Tax & Land Appeals: Qualified as Expert Appraisal Witness
Rockingham (NH) County Probate Court: Admitted as Expert Appraisal Witness
Windham (VT) County District Court: Admitted as Expert Appraisal Witness
State of Maine: Certified Maine Assessor (#740)
State of Vermont: Project Supervisor

DOUGLAS ROLLINS

MASS APPRAISAL EXPERIENCE

KRT APPRAISAL, HAVERHILL, MA

10/2014- Present **Data Collector/Review Appraiser**

Responsible for the data collection of residential and commercial properties. Responsibilities include accurately locating, identifying, and measuring the exterior dimensions of assigned properties as well as making a thorough inspection of the interior of the property. Specific duties include data collection, building permits, digital imaging, callback appointments and residential field review. NH DRA Certified Assessor and A Certified Project Supervisor in Vermont.

WORK EXPERIENCE

ASSET MANAGEMENT SPECIALISTS, PORTSMOUTH, NH

07/2013-08/2014 **Assistant Manager**

Responsible for quickly assessing amount of work and time needed at each property. Daily tasks include taking photos of work being completed on-site, upgrading inadequate safety hazards at a property, quality control, performing routine inspections, tracking inventory, and crew supervision.

LIBERTY REALTY GROUP, LYNNFIELD, MA

12/2008-12/2012 **Assistant Real Estate Agent**

Responsibilities include dealing with tenants and tenant issues, showing apartments and houses to clients, completing paperwork for background checks, creating expense reports for repairs needed, developing budgets and action plans for property renovations, and preparing scouting reports for foreclosure auctions using Microsoft Word and Excel.

STAPLES, BEVERLY, MA

07/2012-06/2013 **Mobile Phone Sales Consultant**

Responsibilities include providing excellent customer service, educating customers about different phones so they can make an informed decision for their purchase, and completing necessary paperwork to process accounts.

EDUCATION

Kingswood Regional High School, Wolfeboro, NH (1996-1999)
Diploma

APPRAISAL EDUCATION

JMB Real Estate Academy
Basic Appraisal Principles (2016)

IAAO
Income Approach to Valuation (2022)
Fundamentals of Assessment Ratio Studies (2022)
Fundamentals of Mass Appraisal (2022)

NH Department of Revenue Administration
NH State Statutes Part I (2022)

KRT Appraisal, Haverhill, MA
80 Hour In-house Training Program (2014)

NH Certified Assessor (Expires 2026)

GERARD LORTIE

MASS APPRAISAL EXPERIENCE

KRT Appraisal, Haverhill, MA

May 2016 - Present

Data Collector - Responsible for the data collection of residential properties. Responsibilities include accurately locating, identifying, and measuring the exterior dimensions of assigned properties as well as making a thorough inspection of the interior of the property. Specific duties include data collection, building permits, digital imaging and callback appointments.

WORK EXPERIENCE

Home Inspection Directory Corp., Melvin Village, NH

1999 – Present

President/Owner – Owner of an internet based business that helps consumers find home inspectors and related real estate services nationwide. Plan and execute day-to-day operations that include website maintenance, internet hosting, database entry, sales, marketing, customer service, payroll, taxes, accounts payable, accounts receivable, etc.

United Parcel Service, Inc, Laconia, NH

2014 – 2015

Package Handler – Worked in a fast-paced team environment lifting, moving, sorting and handling packages. Loaded and unloaded packages from trucks to be delivered.

EDUCATION AND AWARDS

Wentworth Institute of Technology, Boston, MA

- Architectural Engineering & Building Technology Undergrad Coursework

APPRAISAL COURSES

JMB Real Estate Academy

Basic Appraisal Principles, 2016

KRT Appraisal, Haverhill, MA (2016)

80 Hour In-house Training Program

AUSTIN BENGTON

MASS APPRAISAL EXPERIENCE

KRT Appraisal, Haverhill, MA

February 2024 - Present

Data Collector/Crew Chief - Responsible for the data collection of all types of property. Specific responsibilities include accurately locating, identifying, and measuring the exterior dimensions of assigned properties as well as making a thorough inspection of the interior of the property. Additional duties include building permits (pick-ups), digital imaging and callbacks. Also responsible for leading, training and coordinating groups of data collectors.

PRIOR EXPERIENCE

A.G. Bengtson Builder's, Millbury, MA

2017 – 2024

Carpenter – Extensive experience in residential remodeling and new construction. Provided excellent communications with customers on job challenges, order changes and job progress.

EDUCATION

Worcester State University, Worcester, MA (2013 – 2017)

Bachelor of Science in Criminal Justice

Bachelor of Art History (Double Major)

Graduated Cum Laude with a GPA of 3.5

APPRAISAL TRAINING

KRT Appraisal, Haverhill, MA

80 Hour In-house Training Program (2024)

JAMES VENUTI

MASS APPRAISAL EXPERIENCE

KRT Appraisal, Haverhill, MA

April 2023- Present

Personal Property Specialist

Responsible for the data collection of commercial accounts regarding personal Property valuations. Specific duties include data collection, data entry, form of list review, abatement review, fixed asset review, conducting taxpayer hearings, scheduling, training, and supervision of overall value accuracy. Working with City Assessors in a joint effort to deliver a true and accurate account of all taxable accounts within their district. Meeting with Department of Revenue representatives to discuss the City's final committed values. Conducted and delegated areas of street canvassing to determine additional accounts that needed to be added to the existing Tax roll. Determined and verified accounts that needed to be removed from the existing Tax roll.

RELATED EXPERIENCE

Real Estate Research Consultants Inc. (RRC), North Andover, MA

1996-2022

Project Director for Personal Property

Supervised, trained, and mentored a crew of six for ongoing data collection. Responsible for job scheduling and meeting strict deadlines. Reviewing Form of lists, and fixed asset reports. Reviewing abatement applications and resolving taxpayer issues. Scheduling and conducting taxpayer hearings. Working with City Assessors in a joint effort to deliver a true and accurate account of all taxable accounts within their district. Meeting with Department of Revenue representatives to discuss the City's final committed values. Conducted and delegated areas of street canvassing to determine additional accounts that needed to be added to the existing Tax roll. Determined and verified accounts that needed to be removed from the existing Tax roll. Assisted in sales and marketing of the company's services.

EDUCATION

Danvers High School, Danvers, MA (1989-1993)

Diploma

KRT Appraisal, Patriot Properties and AssessPro5

Strategic Partnership

KRT Appraisal (KRT) and Patriot Properties created a strategic partnership in late 2021. In this partnership, KRT has the rights to market and sell Patriot Properties software products in Maine and New Hampshire.

AssessPro5 (AP5) is one of the most versatile and comprehensive assessing products available today. It is currently installed in 18 states and counting. Patriot has been in business since 1985 providing superior CAMA systems and revaluation services. AP5 offers real estate and personal property software integrated into one package and embedded GIS links using the latest ESRI technology.

Support

KRT customers who use Patriot software will have a license agreement with Patriot Properties. Customers will have two levels of support as both KRT and Patriot Properties will support the software and provide training. Typically, KRT will train local clients and provide basic support. Complex issues will be referred to Patriot through their toll free customer support. AP5 users will have the opportunity to attend a user group meeting hosted by Patriot Properties annually in Massachusetts. This opportunity for additional support, training and related activities is invaluable.

Tax Billing

Unless a Town's CAMA has tax billing software embedded into it, a bridge will be needed to get the data from CAMA into the Town's tax billing software to generate tax bills. In most cases this is a simple data export file that bridges into billing. It's usually not a perfect system, but with a little extra effort it can easily be done. KRT is willing to assist with this process if needed for successful generation of tax bills.

Successful Conversions

In the four years since this agreement has been established, KRT has successfully signed and converted eight Maine Towns to AP5. These Towns are Bangor, Sullivan, Cape Elizabeth, Buckfield, Nobleboro, Farmington, Waterford and Oxford. KRT has also converted the Town of Putney, Vermont.



Property Revenue Optimization

AssessPro

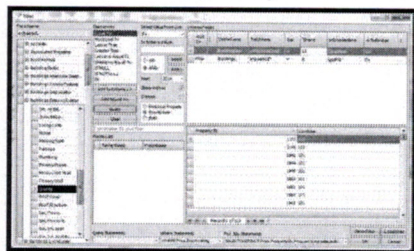
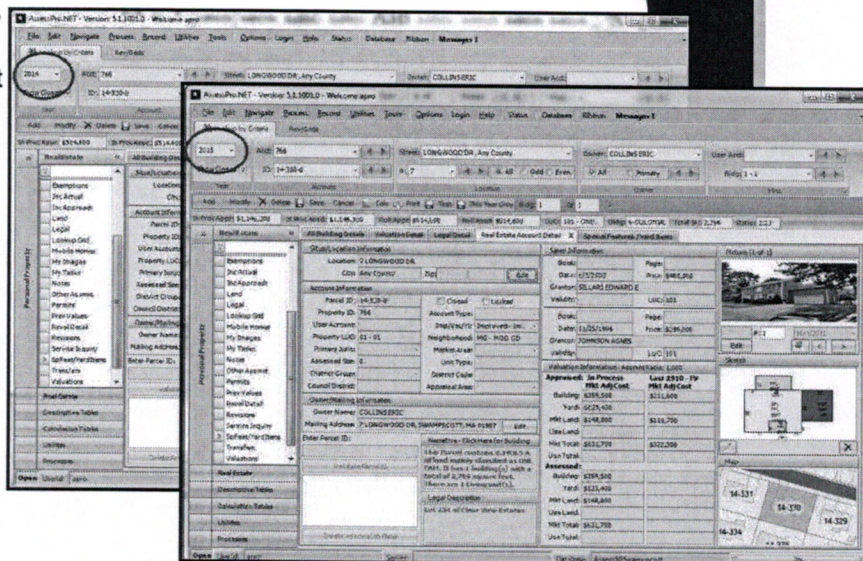
Patriot Properties AssessPro

Easy to read, easy to use and highly configurable to your specific business needs, **AssessPro** continues to be the CAMA system of choice for customers that want a suite of tools that consistently delivers better results. **AssessPro** lets staff focus on data quality and analysis and not on tedious tasks.

Navigation: Along with tabs to enter and review detailed data, **AssessPro** provides a simplified summary screen that is the primary navigation tool to access all of your most critical information and incorporates true application integration to launch sketches, imagery and GIS – all neatly linked together right on the Record Card.

Filter: **AssessPro** utilizes a powerful filtering system that provides the user with the ability to focus in on any property subset. The filter contains nearly every field in the database and

is very simple to operate. Results filter the desktop, reports, analyses, and export to Excel in a click.



Unique Database Structure: One of the key features is the multiyear processing capabilities. Users can start any year's work at any time and changes will automatically be valid in all future years. No merging or double data entry. Each year has its own color scheme to make it clear to staff what year they are in. The database design is highly efficient NOT duplicating data that does not change year to year.

AssessPro is built openly, which allows for a wide variety of third party applications to be tightly integrated and easily updated over time.

- **Multi-Year handling, work can be performed for all future years**
- **Enable the land records and finance teams to work together in a streamlined and cohesive manner**
- **Readily configurable to assist in streamlining your business processes**
- **Integrated Sketching and Geospatial tools that graphically extend the (CAMA) functions**

From CAMA to Collections — Your Source for Reliable Solutions



AssessPro

Workflow – *AssessPro* has a variety of tools available to meet all of the requirements for workflow. Customizable for tracking, reporting and notifications on data development, includes user settings for viewing, not viewing editing and reporting data across the system.

Assessment Notices – *AssessPro* meets all of your needs for processing assessment notices for Annual Requirements, Supplemental Requirements and integration.

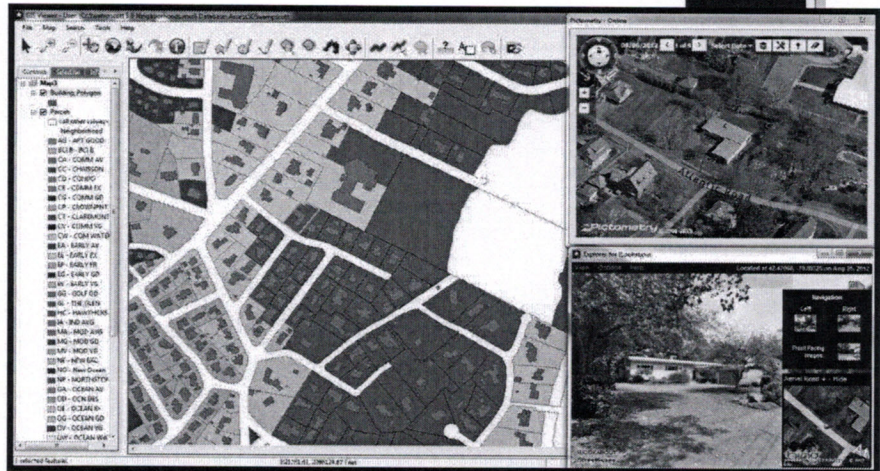
Auditing – In addition to a variety of routine audit reports that are included with the system setup, our implementation team assists in generating and training on custom audit reporting.

Valuation – *AssessPro* provides industry leading tools for the full valuation of all property types by any of the three methods of valuation: Cost, Sales Comparison, and Income as well as other methods for a total of 16 valuation options. The application provides the User with the ability to accurately reflect fair market value and then adjust that value for special use considerations, exemptions, and property class assessments and to finally set main and district tax rates against the value to produce a tax bill.

Analysis -The advanced suite of Analytical Tools provided in our system are developed to vastly improve the way you defensibly do the business of Mass Appraisal. Many versions of the same parcel can be saved in the analysis database to have characteristic sets concurrent with the time of sale. *AssessPro's* tools are highly customizable to suit your business needs regardless of the requirement.

SketchPro - *AssessPro's* sketching toolset, *SketchPro*, is a highly functional drawing toolset that provides a fully integrated relationship with (CAMA), GIS, GPS, imagery and even voice recognition. All areas drawn include all related assessing factors which are tied directly to (CAMA) for all calculations.

One of the most significant benefits realized by our customers who have implemented the Patriot Property Revenue Optimization suite is in the ownership and reliability confidence that comes from full access to all aspects of your software and your data.



Your Source for Reliable Solutions

With hundreds of installations across North America, Patriot has been continually growing over our 36 years of unparalleled service to Local Governments. Patriot prides itself in our phenomenal support and vast experience in the design, conversion, setup, installation and training. Patriot is fully committed to meeting your goals and our references can attest to Patriot's track record of being on time and on budget—with high marks for ongoing client satisfaction. Please call or go to our website for more information.





AssessPRO AP5 Highlights

- ❖ **All years in one database.**
 - ✓ Efficient use of Server Resources
 - ✓ RE and PP modules integrated into one database
 - ✓ Opening a new year does NOT duplicate data
 - ✓ All data is maintained as an insert, never a delete or overwrite, so a complete audit history is maintained
- ❖ **AP5 built on the powerful Microsoft .NET framework**
 - ✓ Data presented in user controllable grids and forms
 - ✓ All informational grids include sort, filter, group, output options and more
 - ✓ Information grids contain live data – add and edit directly in the grid
 - ✓ All data forms customizable by client
- ❖ **Robust Security Module**
 - ✓ Security Permissions and Actions assigned by Role
 - ✓ Administration of Users, Roles, Actions and Permissions all in one screen
 - ✓ Active directory capable
- ❖ **Appealing Graphical User Interface (GUI)**
 - ✓ Windows Ribbon Menus
 - ✓ Collapsible Informational Menus – RE and PP
 - ✓ User defined workspace – keep all needed forms open
 - ✓ Multiple Monitor Capability
- ❖ **Task Management Utility**
 - ✓ Assign Multiple Parcel Activities with One Task
 - ✓ Select Parcels using the Filter Utility
 - ✓ Create, Assign and Supervise completion from one location
 - ✓ Track task performance by Employee or Task
- ❖ **Image Management**
 - ✓ Manage Multiple Images per Property
 - ✓ Multiple Images are easily re-sequenced
 - ✓ Separate SFYI image controls
- ❖ **Filtering Utility**
 - ✓ Select Properties using detailed criteria expressions
 - ✓ Create ad-hoc reports with fields selected for listing output
 - ✓ Send results to AP5 for review or to Integrated GIS Map
 - ✓ Batch Update Capability for filtered data set

❖ **Patriot API – Application Program Interface**

- ✓ Extends your CAMA via Integrations and Interfaces
- ✓ Enables you, Patriot and/or third-party developers to securely transfer information into and out of the CAMA
- ✓ Offers tightly controlled and flexible security settings. Each developer is assigned their own login credentials, enabling you to acutely control their security settings

❖ **Enhanced Comparable Sales**

- ✓ Panel of control parameters including distance maximum
- ✓ Dozens of assignable weighting variables
- ✓ Model Creation and Retention
- ✓ Output results to Screen, Report and Map

❖ **Comprehensive Report Module**

- ✓ Over 900 Canned Reports
- ✓ ALL Jurisdictional Reports
- ✓ User defined outputs using the Filter Utility
- ✓ Create Reports from Map Selections

❖ **Comprehensive Table Driven Valuation Methods**

- ✓ Market, Sales, MRA, Marshall Swift, Income and More
- ✓ Valuation Screen with Quick List, Map Output and Similar Property Statistics
- ✓ Easily Modifiable Calculation and Pricing Tables
- ✓ Analysis Module for Testing Rate Changes

❖ **GIS Online**

- ✓ Dynamically Integrated into CAMA
- ✓ Multiple Selection Methods
- ✓ Full Rendering Capabilities
- ✓ User Workspace Controls – Create, Save and Reload

❖ **Patriot Integrated Products**

✓ **SketchPro**

For 30 plus years the standard for seamless sketch integration with CAMA. Full featured sketch program, draw with mouse or keyboard. Assign areas automatically updates the Building Form and values the building.

✓ **MobilePro**

Enables the field appraiser to download a filtered set of properties to a windows-based tablet device and administer off-line changes to those parcels. Download does not lock or prevent edit of those parcels in office. MobilePro, when connected, synchronizes the changes between the tablet and the office.

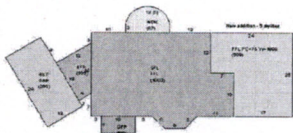
Patriot Properties has been providing assessment and software services for more than 3 decades. Patriot is still run by the original managing partner group, and now provides services and software to a client base of 232 customers in 18 states. We would welcome the opportunity to demonstrate to you the breadth of our suite of software applications and partner with you to provide your staff and your citizens with a proven and reliable suite of CAMA products.

GISPro

Geospatial tools provide an amazing means of accessing data in a global way that is unmatched.

Geographic Data Analysis and Reporting is a high priority with Patriot Properties. Through **GIS Viewer**, a wide variety of additional analysis and reporting capabilities are at your disposal. Thematic reports, maps and quick visualization search tools are available to be fully customized to suit your needs.

Full integration means bi-directional data updates from and to the CAMA using GIS as a visual interface. GIS Viewer also provides a comprehensive set of tools for performing parcel map creation and map maintenance functions



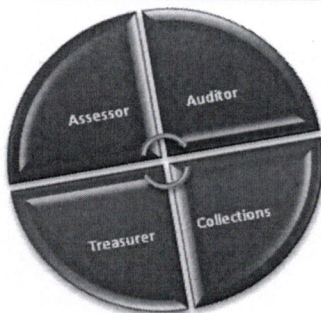
Proper real-time synchronization is critical to a successful enterprise approach to GIS as well. Our system manages edit events within ArcMap,

recognizing when parcel records change, and creates transactional records in an underlying database transaction layer. The edits from the GIS can flow directly into a staging area where they will go through interim QC and processing before posting automatically to AssessPro.

Unlike many other CAMA systems, GIS Viewer is embedded in AssessPro for a true integration between assessing and valuation functions and Geospatial functionality. GIS Viewer does not require any custom programming to set up and gives the user an easy way to link to and from AssessPro.



- **Directly update CAMA Data from selections map**
- **View and analyze CAMA Data on the map**
- **Direct communications and data sharing between departments**
- **Improved reporting and auditing across departments and reduction of the need to import and export data**
- **Significant reduction of manual data entry**
- **Send selections directly to reports and filter**
- **GIS Viewer's 'stand apart' functionality was internationally recognized by ESRI just two years ago through their Partner of the Year award**



From CAMA to Collections—Your Source for Reliable Solutions

With hundreds of installations across North America, Patriot has been continually growing over our 36 years of unparalleled service to Local Governments. Patriot prides itself in our phenomenal support and vast experience in the design, conversion, setup, installation and training for all of your needs from CAMA through Collections. Patriot is fully committed to meeting your goals and our references can attest to Patriot's track record of being on time and on budget—with high marks for ongoing client satisfaction. Please call or go to our website for more information.





**Request for Proposals
Property Revaluation Services**

January 3, 2025

PROJECT SUMMARY

The Town of Damariscotta seeks competitive proposals for a complete revaluation (Project) of all taxable and tax- exempt real and personal property within the Town of Damariscotta, Maine (Town) effective no later than April 1, 2028 (The effective date). The expected tax commitment date, using these values, is mid- July immediately following the effective date.

BACKGROUND

Damariscotta is home to historic shell middens, the original Reny's, some of the most productive oyster growers, and the Damariscotta Pumpkinfest and Regatta. Our community is located at the head of the Pemaquid Peninsula along the Damariscotta River and serves as a service center community for the nearly 10,000 people living in our neighboring communities. Our community has a vibrant and historic downtown and hosts some of Lincoln County's largest employers, most notably Maine Health Miles Campus.

Damariscotta spans 14.71 square miles, with 12.42 square miles of land and 2.29 square miles of water. According to the 2020 U.S decennial Census, the Town's full-time population is approximately 2,297. The last full revaluation was in 2005. The Town uses Harris for Local Government TRIO system for both real and personal property, which is hosted and maintained on the Town's local server system. This system is utilized for the valuation of both real and personal estates.

There are approximately 1,840 total real estate accounts, including approximately 500 commercial/industrial properties and 75 exempt properties. The commercial properties are largely small-medium scale retail stores and service business, along with some light manufacturing facilities and one hospital campus. There are approximately 300 personal property accounts with BETE accounts averaging approximately 20 per year. The town's 2024 equalized State Valuation is \$537,100,000.

PROJECT SCOPE

The scope of the Project requires the complete appraisal and revaluation of all developed taxable real property, all tax-exempt real property, all taxable personal property and all tax exempted personal property located within the corporate limits of the Town of Damariscotta, Maine as of the effective date of the Project.

The Company shall furnish all labor, materials, supplies, and equipment, and shall perform all work for the Project in strict accordance with the specifications outlined in this RFP.

The values to be determined shall be "just value" as defined in Maine Statutes and Maine Supreme Court decisions. The basis of valuation shall be the recognized methods of appraising real and personal property. It is anticipated that property will be valued at 100% of full market value, however a final determination of the ratio assigned will be determined by the Board of Assessors and/or Assessors Agent dependent upon market conditions at the time of the effective date of the project.

SUBMISSION REQUIREMENTS

All proposals shall include:

1. **Cover Letter:** A brief introductory letter.
2. **Company Personnel:** Provide relevant information regarding your project team including:
 - a. Overview of the Firm: Number of years engaged as a Company, corporation, partnership, or individual specializing in governmental tax revaluation services.
 - b. Experience: List of all municipal revaluations completed during the past five (5) years, including client contact, and telephone number, A list of Equalization Contracts for which the Company is currently committed.
 - c. Project Team Member(s): Name(s) of project team members, including the supervisor to be assigned to this project, along with project team member resumes/qualifications.
 - d. Contact Details: Name and telephone number of person(s) to be contacted for further information and clarification.
3. **Understanding:** Provide a (brief) summary of your understanding of the project.
4. **Approach:** Describe your recommended approach to complete the tasks outlined in the scope of services (above) including:
 - a. Specifics of Company's revaluation plan for Damariscotta.
 - b. Description of the Company's public relations program that would be used during the Project such as scheduling, staffing, and conducting informal hearings.
 - c. Description of total cost and quality controls including:
 - i. Total cost of Real Property Revaluation
 - ii. Total cost of Personal Property Revaluation
 - iii. Effective date of proposed Project, with rationale for proposed effective date
 - iv. Time schedule filled out according to the Revaluation Schedule
 - v. Staged fee payments filled out according to the Revaluation Schedule
 - vi. Detailed Cost of appeals to State Board and Court
5. **References:** Names, addresses (including e-mail), and telephone numbers of representatives of current or recent clients familiar with the services your firm and project team.
6. **Additional Information:** Any other supplementary information that in the opinion of the Company may assist the Town in evaluating the Proposal.

PROPOSAL DEADLINE AND BID OPENING

Sealed Proposal shall be clearly marked "PROPOSAL– REVALUATION PROJECT" and addressed to Town Manager, Town of Damariscotta, 21 School St, Damariscotta, ME 04543 and shall be supplemented by an electronic copy sent to adorr@damariscottame.com.

Anticipated RFP Timeframe:

Proposal Deadline/Bid Opening	Thursday, February 6, 2025
Proposal Evaluations	Thursday, February 13, 2025
Selection of Company	Wednesday, February 19, 2025
Execution of Contract by Company	On or before March 12, 2025
Performance Bond ¹	Agreed upon percentage with Town

¹ Said bond or check shall be given as security, that if the Proposal is accepted a Contract will be entered into. The proposal bond or check shall be forfeited and the principal amount of said proposal bond shall be paid to the Town. The agreed upon amount with the Town shall cover liquidated damages in case of failure to enter Contract.

Proposals received prior to the time of opening will remain sealed. All Proposals shall be delivered by 4:00 P.M. on Thursday February 6, 2024. Proposals shall be opened publicly at 4:00 pm on the same day.

APPENDIX A
FINAL SELECTION EVALUATION CRITERIA

The Board of Assessors and/or Assessors Agent will evaluate each proposal based upon the documentation requested herein using criteria which include but are not necessarily limited to or in the order of the following:

1. *Organization, qualifications, and experience: 35%*

- a. Describe the Proposer's experience providing services like those requested for this project. Identify at least 5 projects on which your Company has performed work comparable to that required in this RFP in the last 5 years. Include Company name, contact name, address, and phone number, as well as a description of the project, dates of the project and results.
- b. Identify the key staff who will be assigned to fulfill the contract requirements. Provide resumes describing their educational and/or work experiences.

2. *Project/Proposal Approach: 30%*

- a. Describe how the proposed revaluation plan addresses the project scope.
- b. Describe how the public relations plan addressed the project scope.
- c. Describe how the proposal addresses any additional considerations outlined in the project scope.

3. *Anticipated Schedule: 10%*

- a. Stated Effective date of the project. April 1, 2026; April 1, 2027; or April 1, 2028
- b. Provide a schedule of deliverables and any other relevant milestones.
- c. Describe how the firm will manage its overall workload to meet deadlines for the deliverables and other relevant milestones listed above.

4. *Fee Statement: 25%*

- d. Proposed cost of services
- e. Describe how the firm will control and monitor its costs

The Town reserves the right to reject any, or any part of, or all Proposals; to waive informalities and technicalities and to accept that Proposal which the Town deems to be in the best interest of the Town whether it is the lowest dollar Proposal or not. On or before **February 24, 2025**, the Town will notify the selected Company that it has been selected.

Appendix B
GENERAL CONTRACT CONDITIONS

On or before **March 12, 2025**, the selected Company shall execute with the Town a Contract based on the General Contract Conditions the following contract conditions, as outlined below, shall be included in greater detail in the contract between the Company and the Town.

- Changes in the contract
- Subletting to specialists
- Performance surety bond
- Indemnification
- Insurance
- Severability, Waiver, Cancellation and Misrepresentation Clauses

Periodic Payments: The Town will pay the Company amounts as billed less a ten (10%) percent retainage through conclusion of the local appeal process.

Surety:

1. The Company shall provide a performance bond or other surety acceptable to the Town of Damariscotta for not less than one hundred percent (100%) of the total contract price with a corporate surety to be conditioned upon the faithful fulfillment of the total contract.
2. If Sub-Companies are used payment surety must be submitted in a form as approved and accepted by the Town of Damariscotta.

Indemnification and Insurance:

1. The Company agrees to defend and indemnify the Town against claims for bodily injury, accidental death, and property damage, which may arise during the Company's performance of the contract, and, in all other respects, to hold the Town harmless from both inadvertent and negligent acts of the Company, its employees, and agents.
2. The Company shall not be responsible for consequential or compensatory damages arising from the late performance or non-performance of the contract caused by special or unusual circumstances beyond its reasonable control, such as acts of God or force majeure.
3. The Company shall maintain public liability insurance, automobile liability insurance and workmen's compensation insurance, with appropriate endorsements to the Town, as its interests may appear. The municipality and its officers, employees, and agents, other than those agents working for the Company must be named as additional insureds.
4. The public liability insurance shall be in the form of a standard commercial general liability policy with the inclusion of contractual liability coverage and shall provide coverage against claims for personal injury, death, or property damage with limits of at least:
 - a. \$2,000,000, each person
 - b. \$2,000,000, each occurrence, for bodily injury liability, and
 - c. \$2,000,000, each occurrence, for property damage liability.
5. The automobile liability insurances shall be in the form of a standard comprehensive automobile liability policy.

6. The Company shall not deny liability because of any legal defense to which the municipality is entitled by reason of being a municipality.
7. The Company shall carry valuable papers insurance on any and all records applicable to the project against the loss or destruction of such records in an amount of not less than the contract price.
8. Liability limits shall not be less than the limits established in the Maine Tort Claims Act, 14 M.R.S.A §8101-8166, as they may be amended from time to time.
9. The Company shall provide to the Town:
 - a. Certificates of insurance, written by an insurer or insurers licensed to do business in the State of Maine, confirming the required insurance coverage is in effect on the date of execution of the Project Contract, and
 - b. An agreement by insurer(s) that a 10-day written notice of impending cancellation or material change in insurance coverage by insurer(s) will be provided to the Town before cancellation or change should occur.

Liquidated Damages/Penalties: Failure of the Company to meet contracted deadlines for completion of work and approval by the Board of Assessors and/or Assessors Agent as having met the standards of these Specifications and the Contract, shall be cause for payment of liquidated damages by the Company, on demand by the municipal officers, according to the following schedule:

- 1 to 10 working days = \$100 per day
 - 11 to 20 working days = \$250 per day
 - Over 20 working days = \$500 per day
- a. All properties measured, listed, and photographed through the effective date of the Project
 - b. All completed assessments given to Board of Assessors and/or Assessors Agent for review
 - c. All assessment notices addressed and mailed
 - d. Informal hearings completed
 - e. Final values in TRIO and all revaluation records, items and systems are delivered to the Assessor's Agent Office in accordance with the General Contract Conditions

Notwithstanding mutually agreed upon extensions, failure to meet the contracted deadline for completion of the Project shall be cause for payment of liquidated damages by the Company, on demand by the municipal officials, of One Thousand (\$500) for each day beyond the specified date of completion.

The Company shall not be liable for delays caused by reason of war, terrorism, strike, explosion, Acts of God, Orders of Court, or other public authority.

Town Contact: Unless otherwise indicated in this RFP, all correspondence to be sent to the Town shall be sent to the following address:

Andrew Dorr, Town Manager
21 School St
Damariscotta, ME 04543

Additional Requirements: The Town reserves the right to specify additional requirements for inclusion in the final agreement with the Company.

REVALUATION SCHEDULE

The Company shall start the equalization project as soon as practicable after signing the Contract, or upon a date as agreed to by the Board of Assessors and/or Assessors Agent. Thereafter the Company must continue in a diligent manner to ensure completion within the schedule of completion dates as set forth below.

Completion Dates: The Company shall submit a schedule for the phases of the Project which sets forth the dates for completion and that schedule shall be incorporated into the Contract and shall be binding upon the Company. The phases of the Project are as follows:

1. Assignment of the Project Manager who shall be the Company representative on the project
2. Public information and media releases
3. Complete residential data collection: measuring, listing and photos
4. Complete commercial, industrial, public utility, special purpose, and tax-exempt data
5. Collection-measuring, listing and photos
6. Complete land study and value analysis and development of Land Pricing Schedules
7. Complete building cost manual and development of Cost Schedules
8. Complete market data study to begin appraisals
9. Complete study of market rents, expenses and capitalization factors to begin appraisals
10. Valuing of land
11. Valuing of buildings
12. Deliver completed residential appraisals on property record cards with all measurements, sketches, listings, pricing, review and values, incorporating all building permits up to and including the effective date of the project, to the Board of Assessors and/or Assessors Agent
13. Deliver completed commercial, industrial, public utility, and special purpose appraisals on property record cards with all measurements, sketches, listings, pricing, review and values including assessment computation to the Board of Assessors.
14. Assessment notices mailed
15. Informal hearings begin
16. Informal hearings completed
17. Determination notices mailed
18. Computer file is updated for all final appraisals
19. Assist the Board of Assessors with formal appeals
20. Assist the Board of Assessors with appeals to Board of Assessment Review

RESPONSIBILITIES OF REVALUATION COMPANY

The Company's Project Manager and Board of Assessors shall regularly discuss the progress and various other details of the Project. These discussions may be scheduled to occur more frequently if they are found to be necessary by the Town.

Property data, and/or appraisals and records shall not be made public until after the assessment notices are mailed.

Equipment and Supplies: The Company shall provide all equipment and supplies at the Company's expense except as otherwise provided herein.

Deliverable Products: All documents, records, data, and other materials procured or produced in the performance of the Project will become the sole property of the Town. The documents, records, data, and other materials will include:

1. Documentation of procedures used throughout the Project
2. All manuals used in any phase of the Project
3. Data collection and valuation manuals for use in maintaining and updating values
4. Detailed valuation manuals, including tables and formulas used in applying the cost, sales comparison, and income approaches to property valuation; grade and housing type descriptions for each grade and housing type
5. Source information used in the development of cost, sales comparison, and income approach schedules
6. A field card for all properties
7. Digital photos of all buildings
8. All manual and computerized reports supporting valuation formulas and values for vacant land and improved properties
9. All sales ratio studies used in the Project
10. Field review documents reflecting preliminary values, adjusted preliminary values, and any notes relative to informal review actions
11. A report on all informal hearings. Each meeting with property owners shall be documented stating the property owners' issue(s) and the Company representatives response(s). A final report showing the number of hearings, the number and amounts of values changed
12. Valuation List of new values
13. All documents shall be delivered as digital files, unless otherwise specified by the Board of Assessors
14. The Company shall provide training for appropriate Town personnel, adequate to provide them with the knowledge necessary to understand and use the appraisal system and/or other software installed by the Company, if necessary.

Public Relations: The parties to this Project recognize that a good public relations program is required. The Company shall support the Board of Assessors in conducting a public information program. All public information releases shall be approved by the Board of Assessors prior to release. The Company shall submit a detailed public relations plan to the Town with its proposal.

The program must include but is not limited to:

1. Prior to Data Collection:
 - a. Press releases
 - b. Meetings with local officials
 - c. Public meetings on the following topics:
 - i. Laws concerning revaluation market value
 - ii. General outline of revaluation project

- iii. Data Collection
- iv. Valuation procedures
- v. Review procedures
- vi. Informal hearings
- vii. Taxpayer formal appeal proceeding
- viii. Pre-data collection leaflet/notice to property owners

2. During Data Collection and Valuation:

- a. Press releases
- b. Meetings with local officials
- c. Meeting with civic groups
- d. Public Meetings

3. After Data Collection and Valuation:

- a. Press releases
- b. Meetings with local officials
- c. Public meetings
- d. Informal Hearings
- e. Board of Assessment Review meetings

Conduct of Company Employees: As a condition of this Contract, the Company's employees shall treat residents and Town employees with respect and courtesy. The Company shall take appropriate and meaningful disciplinary measures against those who violate the terms of this provision and shall immediately remove any employee from the project if requested to do so by the Board of Assessors.

Inspections: All physical improvements shall be inspected, measured, and listed, noting all interior and exterior construction details, quality of construction, age, and condition.

Sketches: Sketches of all significant buildings shall be drawn to scale with dimensions given on the property record card.

Data Entry: All data entry will be entered into the Town's TRIO system by the Company.

Field Work Quality Check: At the end of each month the Company shall provide the Board of Assessors and/or Assessors Agent with pdf files of each updated property record card until the completion of the public hearings. The Assessors Agent may conduct checks to ensure quality of data collection. The Company shall notify the Assessors Agent monthly of the region of Town field collection will take place in the following month so that the information can be posted on the Town's website. In addition, all changes made by the Assessors Agent in property values as a result of these reviews will be changed by the Company within one week of receiving the changes.

Sales Analysis: The Company shall analyze qualified sales for the two (2) year period immediately preceding the effective date of the project. These sales shall be reduced to appropriate units of comparison and segregated into the following major categories: vacant residential land, vacant commercial land, vacant industrial land, mobile homes, residential condominiums, commercial condominiums, residential properties, commercial properties, apartment properties and industrial properties. Further subcategory breakdown such as ranch, split level, cape, retail, office, gas station, etc. will also be required. No values shall be set until such an analysis is presented to, reviewed, and accepted by the Board of Assessors.

Assessment Notices: A notice shall be sent, at the Company's expense, by first class mail, to each owner of record as of the effective date of the project, setting forth the new valuation that has been placed upon the property identified in the notice. If possible, at the time of the notice, an estimated tax rate will be included. The notice shall be prepared in duplicate and conformity with the Maine Law and approved by the Board of Assessors and/or Assessors Agent prior to mailing. The duplicate copies will be delivered to the Assessors Agent in electronic form (i.e. pdf) and arranged in map/lot sequence.

Further, the notices shall include information specifying the dates, times, and place of the informal hearings. Such notices and information shall be subject to approval by the Town.

Prior to sending notices, the Company shall memorialize the proposed new values in the TRIO's Assessment History section as Interim values. The Company and Town shall cooperatively update the Towns Website to allow public access to the property interim property record cards.

Informal Hearings: The Company shall hold informal hearings, at such times and locations as the Town may specify, so that owners of property, or legal representatives of owners, may discuss with qualified members of the Company's staff the assessed valuations of their property. The Company's personnel shall explain the manner and methods of arriving at value. Informal hearings, at the discretion of the Town, may be held on weeknights and Saturdays as well as during business hours. Members of the Town's Assessing Department staff may also be present at hearings.

The Company, in conjunction with recommendations of the Town, shall schedule a sufficient number of hearings and provide sufficient qualified personnel certified by the State of Maine and approved by the Town to handle said hearings expeditiously and fairly.

Any information offered by the taxpayer shall be given consideration, and adjustments shall be made where warranted. The Company shall notify in writing each taxpayer who has appeared at an informal hearing of the results of that hearing whether the assessment has been changed or not. The content and form of such notices shall be subject to the prior approval of the Board of Assessors.

Defense of Values: For requests for abatements or appeals of assessments, the Company will follow the following procedures.

The Company agrees that the Project Manager or Field Appraiser of the Damariscotta project shall be present or available at the request of the Board of Assessors and/or Assessors Agent for the period of time necessary to assist in considering abatement requests and to assist the Board of Assessors and/or Assessors Agent in explaining the basis of the revaluation to property owners.

The Company agrees that the Project Manager in charge of the Damariscotta project should be present if requested at any hearing of local and/or state body of assessment appeals following completion of the project and to defend the values.

In the event of any appeal to the courts, the Project Manager in charge of the Damariscotta project will be present at the hearing to testify as a witness, to outline the steps taken and give his opinion of value of the property which has been or is the subject of appeal.

The Company agrees to assume all costs for services rendered by it in connection with any and all hearings, reviews and/or court actions provided the filing of such hearing, review and/or court action is commenced within one (18) months of the revaluation effective date.

APPENDIX C APPRAISAL SPECIFICATIONS

Appraisal of Land: The Company shall appraise all types of land within the Town.

Land Inspection: The Company shall be responsible for identifying and considering in its valuation of each land parcel the physical, legal, and economic factors which may affect its use and value.

Land Value Study:

- Vacant land sales occurring during the two-year period immediately preceding the effective date of the project shall be analyzed.
- Improved property sales data shall be analyzed, at a minimum, for arms-length transactions occurring during the two (2) year period immediately preceding the effective date of the project, in order to estimate land values by the residual method.
- The Company shall consider factors affecting land value, such as location, zoning, available utilities, size, shape, topography, view, improvements, special exceptions or zoning variances, nonconforming uses, flood plains, flood zones, and special purpose uses.

Land Unit Value: The Board of Assessors and/or Assessors Agent, in consultation with the Company, shall determine what type of land unit values and formulas shall be used for the various types of property and property locations. The front foot, square foot, acreage, fractional acreage and per lot units shall be considered, among other possibilities.

Neighborhood Delineation: The Company shall delineate neighborhood units within the Town.

Land Value Inspections: The Company shall make a physical inspection of each plot of land from the public way and make necessary adjustments in value to compensate for topographical irregularities such as high banks, steep slopes, swamps, irregular shape, or any other factor which may detract from or enhance the value of the land.

RESIDENTIAL BUILDINGS AND STRUCTURES

Data Collection: The Company shall view by physical inspection the exterior and interior of all real property in the Town in compliance with Maine law. The Company should reference, in its response to the RFP, how it intends to facilitate inspections in relationship to Damariscotta's seasonal property owners.

The Company shall make a listing of physical construction details of all the structural improvements pertinent to residential property in the Town on field cards for entry into the TRIO database. Details of all structural improvements are also to be listed on the field cards. Digital photos of each significant structure are to be taken at the first visit and entered into the TRIO database.

Measurer/Lister Identified: The field card and the property record card shall indicate the Lister and date(s) of the listing.

Entrance Refused: When entrance to a building for an inspection is refused, the Lister shall make note of the fact and within two (2) working days notify the Assessor's Agent.

The Company shall not enter premises when only minor children are present. The Company shall make one (1) call back.

Call Backs: Where necessary the Company shall make one (1) call back, which must be on a weekday between 5:00 PM and 8:00 PM, or on a Saturday. The Lister making the call back shall note the time and date of call back on the field card and on the property record card.

Notification Letter: If after one (1) call back, contact was not established with a property owner, a notification letter (approved by the Town) shall be mailed at the Company's expense, notifying the property owner that the representatives of the Company were not able to make contact, and request that within a prescribed time limit the property owner contact the Company to arrange an inspection.

Preliminary Town Acceptance: Prior to the mailing of the assessment notices, the Company's Project Manager will review the final values with the Board of Assessors to ensure that the Assessors Agent is prepared to accept the Company's work.

COMMERICAL, INDUSTRIAL, UTILITIES, EXEMPT & SPECIAL PURPOSE PROPERTIES

All commercial, industrial, public utility, exempt, and special purpose buildings and improvements shall be inspected, classified, priced, and valued.

Description: All buildings shall be identified and described as component parts of construction, size, area, age, and usage.

Income Approach: Income and expense data shall be gathered by the Company on forms approved by the Board of Assessors and/or Assessors Agent, which shall become the property of the Town. Proprietary information of property owners shall not become a public record.

The Company shall develop, with the involvement of the Board of Assessors and/or Assessors Agent, capitalization rates and gross rent multipliers through interviews with bankers, investors, realtors, appraisers, and other informed sources.

The Company shall determine market and economic rents, vacancy rates, operating expenses, capitalization rates, and/or gross rent multipliers applicable to the various classes of commercial, industrial, and special-purpose properties being valued. The Company shall document, in writing, its sources of information, and describe its use and analysis in estimating values.

The Company shall perform the income capitalization approach using generally accepted methods and techniques. Gross rent multipliers shall be used as an additional valuation check where applicable.

The Company shall mail income and expense questionnaires to all commercial and industrial property owners. Responses shall become the property of the Town at the completion of the Project. Proprietary information shall not become a public record.

Fixed Equipment: All fixed machinery and equipment serving a building and taxable as real estate shall be listed within that building and valued in accordance with procedures as outlined in the applicable price schedule. If a question exists whether certain machinery or equipment is taxable as real estate, the Company shall bring that question to the attention of the Board of Assessors and/or Assessors Agent and be bound by the Assessors Agents' determination.

The Assessors Agent shall be notified in writing of any item which might be considered personal property and is included in the valuation of the building. It shall be separately listed and described by the Company either on the property record card or separately on another record.

Review: The reviewer shall be competently trained, certified and fully experienced in the appraisal of the particular type and kind of commercial, industrial, public utility or special purpose building for which the reviewer is responsible.

PERSONAL PROPERTY

The appraisal Company shall provide a brief description of all personal property appraised. The Company shall appraise and total separately each class or kind of personal property. The Company shall conduct an examination of the property involved, sufficiently detailed to ascertain the reasonableness of the information provided. Where records or statements are of little assistance the Company shall list and value major items of property individually. Minor or group items may be combined, listed, and valued in a total value for the group or kind. A major item is here considered as a unit, machine, or item of equipment for which the current value is \$2,000 or more.

The Company shall load all valuation data into the Town's TRIO system. The Company shall value and record in the Towns TRIO system all BETE exempt equipment and exempt amounts and submit the qualifying applications to the Assessors Agent for approval.

All personal property shall be valued in accordance with accepted standards established by Maine Statute and the Bureau of Taxation. Where a question arises as to value and/or method(s) of valuation the Board of Assessors shall make the final determination.

Preliminary Town Acceptance: Prior to the mailing of the assessment notices, the Company's Project Manager will review the final values, computed by the Company, with the Board of Assessors and/or Assessors Agent to ensure that the Town is prepared to accept the Company's work. The Board of Assessors and/or Assessors Agent will make the final judgment on the final value.

APPENDIX D RESPONSIBILITY OF TOWN

Maps: The Town shall furnish one set of Tax Maps showing streets, property lines, and parcel identification numbers, along with PDF versions.

Zoning: The Town will furnish one (1) set of the current Town zoning regulations and a zoning map.

TRIO Database & TRIO Software: The Board of Assessors will make available to the Company the current TRIO database.

Property Transfers: The Town shall notify the Company, on a regular basis, of property splits and transfers occurring after the initial establishment of the Company's database for this information. The Company shall update its records in accordance with this notification.

Building Permits: The Town shall furnish the Company copies of all building permits issued during the course of the Project up to the effective date of the project.

Introduction: The Board of Assessors and/or Assessors Agent shall furnish letters of introduction and authority to inspect real estate in the Town along with suitable identification badges.

Mailing Address: The Town shall furnish through the Assessor Agent's Office the current mailing address of all property owners.

Mail: For any mail the Company is required to send in conjunction with this Project, it is the responsibility of the Town to investigate all returned mail for updated name or address and to re-mail such mail.

Office Space: The Town shall furnish the Company with sufficient office space, necessary office furniture and copier equipment to carry out the terms of this project.

Assessing Personnel: The Board of Assessors and/or Assessors Agent may, from time to time, accompany listers/appraisers on property visits.

APPENDIX E DEFINITIONS

Assessors/Board of Assessors: shall mean the duly appointed Assessors of the Town of Damariscotta, Maine

Assessors Agent: Shall mean the Board of Assessors duly appointed, designated representative.

CMA: shall mean Certified Maine Assessor

Company or Company: shall mean any person, firm, corporation, association, or other entity performing the revaluation work under contract.

Contract: shall mean the agreement between the Company and the Town to provide services in accordance with this RFP

Effective Date of the Project: shall mean the statutory date of Assessment. (whichever is specified in the Contract)

Field Card: shall mean the document used in the field to record information about the property when the property is listed and measured

Project or Equalization Project: shall mean the reappraisal and revaluation of all taxable real property and all tax-exempt real property within the corporate limits of the Town of Damariscotta

Property Record Card: shall mean the card generated from the TRIO system

Proposal: shall mean the Company or Company's proposal submitted in accordance with the RFP requirements

RFP: shall mean Requests for Proposals

Specifications: shall mean the requirements of the RFP

Town: shall mean the Town of Damariscotta, Maine